Chapter 3 - Probate Party - PTY

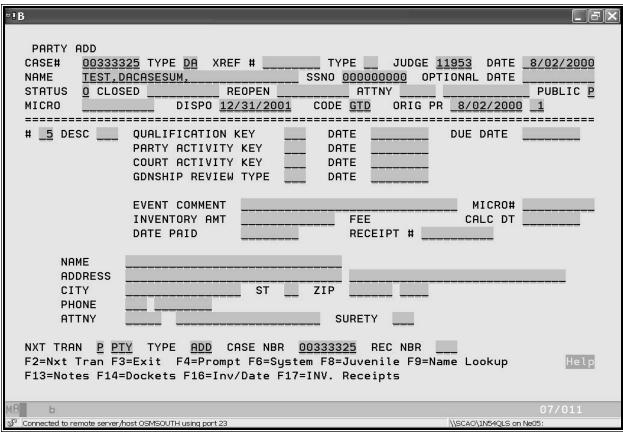
Probate Party Screen

The party screen is used to add information about the juvenile. Users must have security to be able to update case information.

Accessing the Party Screen:

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NXT TRAN <u>P HDR</u> TYPE <u>ADD</u> CASE NBR <u>20025555</u> REC NBR__
```

From the Next Tran Line, enter PTY in the Next Tran field and the option that you want to perform (ADD, INQ, MOD, DEL) along with the case number. Press <Enter> and the system will display the header screen.



Following are the field descriptions for the Party Screen.

~#~

This area displays the party number assigned by the system.

~DESC~

This is a required field. The description specifies the role of the individual within this case. Prompt <F4> for a list of valid party descriptions.

~Qualification Key~

Enter the qualification key. Either BND - Bond or AOT - Acceptance of Trust.

~Qualification Date~

Enter the date that this party qualified. This date will be used to calculate due dates for reports and accountings.

~Due Date~

This date specifies the follow up date. This date may be changed once during the administration of the estate. If this field is left blank when adding a party, the qualification date will be used.

~Party Activity Key~

This code identifies the last action taken by this party. Prompt <F4> for a list of valid party action codes. A schedule record will be created for every party activity. This field can be updated from the schedule screen by selecting a party number.

~Party Activity Date~

This is the date that corresponds with the last party action code.

~Court Activity Key~

This code identifies the last action taken by the court against this party. Prompt <F4> for a list of valid court action codes. A schedule record will be created for every party activity. This field can be updated from the schedule screen by selecting a party number for the event.

~Court Activity Date~

This is the date that corresponds with the last court action code.

~Guardianship Review Type~

This code specifies that the guardianship has been reviewed. The valid codes are RRM - Review of Minor Guardianship and RRG - Review of LIP Guardianship. A schedule record will be created for every guardianship review. The header screen will display information on the last guardianship review that was received and when the next review will be due.

~Guardianship Review Date~

This is teh date that the guardianship was reviewed.

~Event Comment~

Enter comments that will be displayed on the schedule screen for the entry. If this field is left blank, the system will add teh comment from the code table.

~Microfilm Number~

Enter the microfilm number for this event.

~Inventory Amount~

Enter the amount of the inventory in this field for deceased estates. When an amount is entered in this field, the date that is entered will be used to write an event of IFC - Inventory fee calculated to the schedule screen and update the party activity fields if the date of the inventory fee calc is greater than the date of the current party action.

~Fee~

The system will calculate the inventory fee based on the entry made in the inventory amount field.

~Calculation Date~

Enter the date the Inventory amount was calculated. If a date is entered into this field, the system will calculate the inventory even if there is no amount in the Inventory amount field.

~Date Paid~

Enter the date that the inventory fee was paid. The system will write an event of IFP - Inventory Fee Paid to the schedule screen and update the party activity fields if the date the inventory fee was paid is greater than the date of the current party action.

~Receipt~

Enter the receipt number for the inventory fee payment.

~Name~

Enter the name of the fiduciary into this field. Follow the name procedure as explained in Chapter 1.

~Address, City, State, Zip, Telephone~

Enter the address and telephone number of this fiduciary.

~Attorney~

Enter the attorneys bar number that is representing this party. Press <F4> for a list of attorneys.

~Surety~

Enter the surety company for this party. Press <F4> for a list of sureties.

Adding or Modifying a Party

From the Next Tran Line, enter the following:

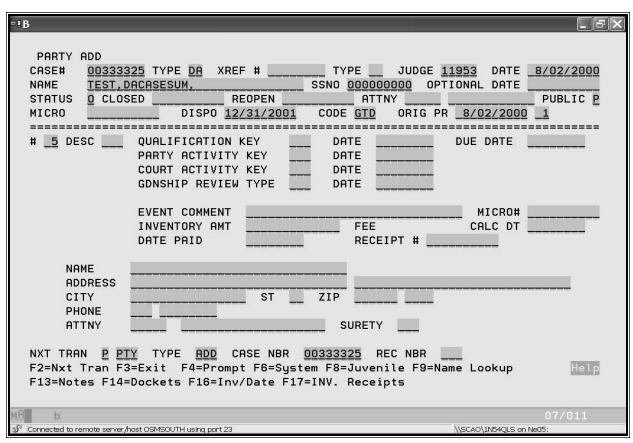
Adding:

```
NXT TRAN <u>P PTY</u> TYPE <u>ADD</u> CASE NBR <u>20035555</u> REC NBR ___
```

Modifying:

```
NXT TRAN <u>P</u> <u>PTY</u> TYPE <u>MOD</u> CASE NBR <u>20035555</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you have requested.



Enter all information regarding the party and press <Enter>. The system will save the party.

Inquiring on a Party

There are two inquiry screens for parties:

- 1. Inquiring on all parties This screen will list all parties for the case and limited information regarding each of them.
- 2. Inquiring on a single party This screen will display the actual party screen for each individual party. All information from the party screen will be displayed on this screen. You must enter the party number that you want to inquire on in the REC NBR field for the party to be displayed.

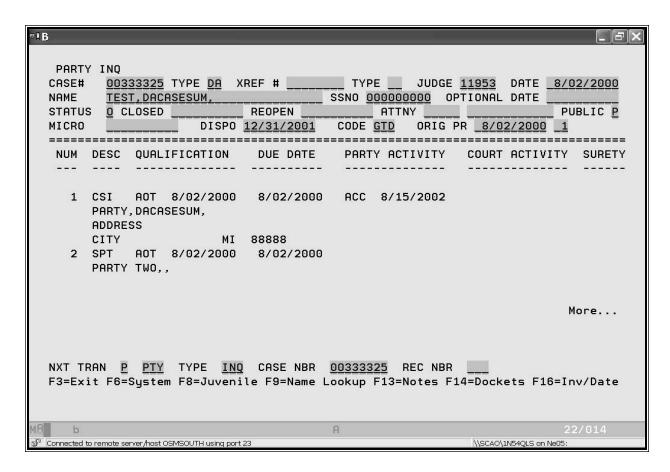
Following are examples of both party inquiry screens.

All Party Inquiry:

From the Next Tran Line, enter PTY/INQ in the Next tran and type field along with the case number.

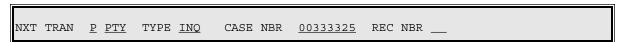
```
NXT TRAN <u>P PTY</u> TYPE <u>INO</u> CASE NBR <u>00333325</u> REC NBR ___
```

Press <Enter> and the system will display the following screen.

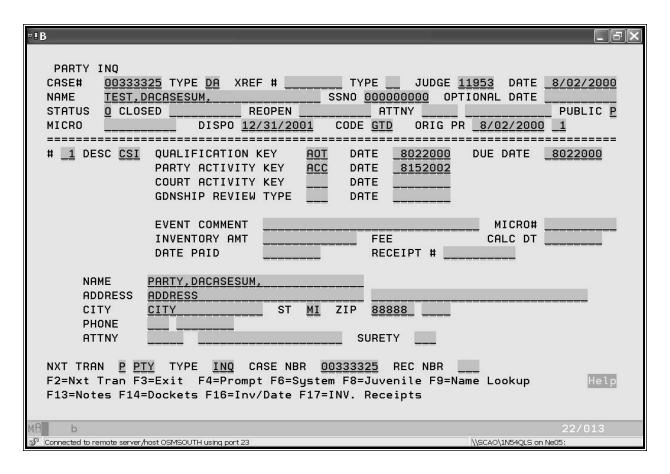


Single Party Inquiry:

From the Next Tran Line, enter PTY/INQ in the Next tran and type field along with the case number and the individual party number.



Press <Enter> and the system will display the following screen.

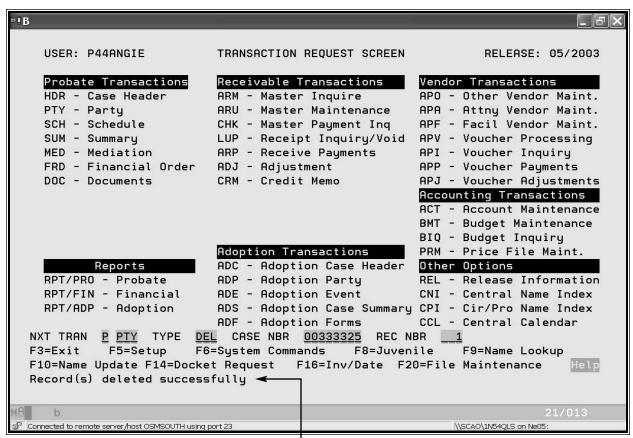


Deleting a Case

From the Next Tran Line enter the following information:

```
NXT TRAN <u>P PTY</u> TYPE <u>DEL</u> CASE NBR <u>20035555</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will delete the requested party.



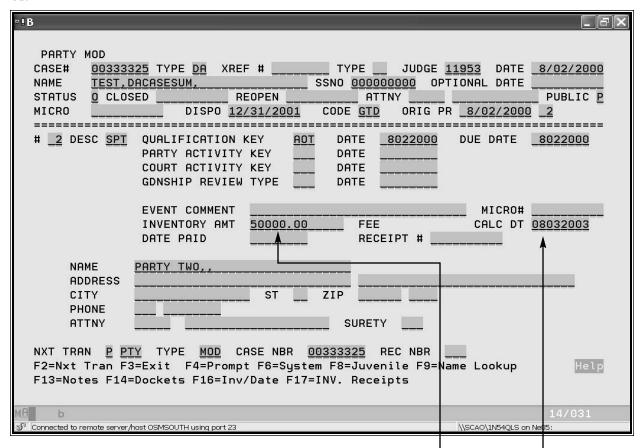
The system will automatically delete the records.

Inventory Fee Calculation

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P PTY</u> TYPE <u>MOD</u> CASE NBR <u>20035555</u> REC NBR <u>01</u>
```

When all information has been added, press <Enter> and the system will display the screen you requested.



- 1. Enter the amount of the inventory in the "Inventory Amt" field.
- 2. Enter the date that you are calculating the inventory for in the "Calc Dt" field.

Press <Enter>. The system will calculate the inventory and display the fee in the "Fee" field.

When an inventory fee is calculated the following entries are made.

- 1. An event of IFC Inventory Fee Calculated is added to the Schedule.
- 2. If the inventory fee calculation date is greater than the existing party action date the system will overlay the information with the IFC and the date that it was calculated.

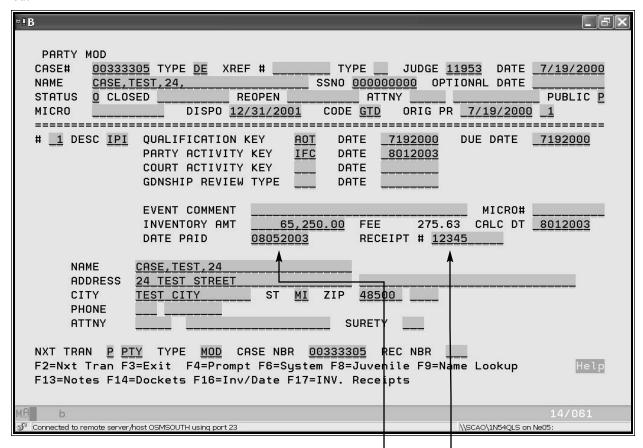
NOTE: If the Inventory Amt is blank or 0.00 the system will calculate the fee as \$5.00.

Inventory Fee Paid

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P PTY</u> TYPE <u>MOD</u> CASE NBR <u>20035555</u> REC NBR <u>01</u>
```

When all information has been added, press <Enter> and the system will display the screen you requested.



- 1. Enter the date of the payment in the "Date Paid" field. I
- 2. Enter the receipt number for the payment in the "Receipt #" field.

Press <Enter>. The system will save the Inventory payment information.

When an inventory fee is paid, the following entries are made.

- 1. An event of IFP Inventory Fee Payment is added to the Schedule.
- 2. If the inventory fee payment date is greater than the existing party action date the system will overlay the information with the IFP and the date that it was paid.